



PARTICIPANTS: *Who is Involved?*

In this section, you will learn more about the participants involved in making your town hall a success, from choosing strategic panelists to targeting your guest list.

The key players who will be directly involved in sharing their expertise and insights at your event will be:

- 👉 **Panelists** — will be key to your town hall; primarily policymakers, but also may include expert presenters.
- 👉 **Expert presenters** — will provide the context for your featured issues.
- 👉 **Moderator** — will guide your panel discussion, engage the audience in asking questions summarize key points, and ask participants to take the First 5 Pledge.
- 👉 **Guests** — will include individuals and groups with a stake and/or interest in the issues and their community.

PANELISTS: Engaging elected leaders and experts from your community

The town hall provides an opportunity for you and your community to have a meaningful dialogue with your local policymakers about the timeliest, most pressing issues facing young children and families. It also is an opportunity to get their commitment to take action on those issues. An ideal panel will consist entirely of policymakers who represent your community at the local, state, or federal levels such as:

- 👉 School Board members
- 👉 City Council members
- 👉 County Supervisors
(ideally, the Supervisor who sits on the First 5 county commission)
- 👉 State Senators and Assembly members
- 👉 Federal Congressional members

Include up to four policymakers on a panel to allow ample time for each to provide their perspectives on the issues. If fewer policymakers are available to participate on the panel, that also works. It provides opportunities for a deeper dive into the issues and even more time for questions. Or, consider including expert presenters to join policymakers on the panel as well.



F5 TIP:

Seek participants who reflect:

Expertise: Recognized thought leaders or influential business leaders with strong credentials.

Diversity of opinion and thoughts: Complete agreement leads to everyone “preaching to the choir.”

Experience: Those personally impacted by the issues such as grantee partners or program participants provide a “face” to your advocacy.

Preparation: Ensure participants are well-equipped with resources and information on the issues, along with their roles and responsibilities.





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Inviting the panelists

How do you know exactly which policymakers to invite? This depends upon several considerations, including:

Issues you most want to influence (for example):

- 👉 If your top priority is to secure more state funding for quality early learning, then invite state-level elected officials whom you can cultivate to be your strongest advocate in the short- and long-term.
- 👉 If you want to create momentum in your community to adopt family-friendly policies within your local government and business community, then invite City Council members or County Supervisors.

Support your existing champions:

Brainstorm policymakers who your colleagues or partners know; who you've worked with in the past; or who are familiar with First 5 issues. Maximize these relationships to invite policymakers to participate. This is the perfect opportunity to revisit, reinforce, and strengthen those existing relationships. Once you've secured the participation of one policymaker, you often can use that to encourage participation by others.

Create new champions:

If you don't have a clear champion for your issues, think through where you can find a nexus between your issues and your area elected officials' policy priorities. This is a prime opportunity to cultivate new champions.

Be careful to ensure town halls are non-partisan and all members and/or candidates for an elective body (i.e., Congressional members, State Legislators, County Supervisors, or Council members) are invited to participate in the town hall equally.

Include policymakers at all levels

From a local School Board member to a federal Congressional member. There is no "correct" combination. Think carefully about the specific Calls to Action and related panelist questions you ask to ensure they are tailored and relevant to each panelist. This also applies to a mix of policymakers and expert presenters on your panel. For example:

- 👉 Tailor your questions and Calls to Action to each panelist by utilizing the state-level Calls to Actions included in the First 5 Issue Paper Templates, and revising each so they are applicable on the local and federal levels.
- 👉 Or, make your questions and Calls to Action more generic rather than specific to the targeted state-level Calls to Actions included in the First 5 Issue Paper Templates.

See First 5 Issue Paper Templates and Sample Panelist Questions under "First 5 Policy Tools section" for more information.

CHECK
IT OUT!



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Scheduling your event

Identify several potential dates and times for your town hall to offer to panelists before setting the final date in order to maximize the chance that panelists can fit the event into their schedules. Review City, County, State Legislative and Congressional calendars to help set your event date. To ensure maximum participation by policymakers at each level, avoid weeknights where these bodies have scheduled meetings.



CHECK IT OUT!

LOCAL: Weeknight evenings or Saturdays are likely your best days to attract local elected officials, business representatives and other partners, and parents.

STATE: [Click here to see the State Legislative calendar.](#)

The State Legislature's 2016 fall recess runs from September 1 until December 5, 2016. If your event falls during the State Legislative session, Thursday and Friday evenings are best for State Legislators.

If your goal is to influence the California budget, then plan your town hall for March through May 2017.

FEDERAL: [Click here to see the Congressional calendar.](#)

Congress will be on their 2016 fall recess from October 3 until November 14, 2016.

If your event falls during the Congressional session, Fridays and Saturdays at any time of day are best for Congressional members.



F5 TIP:

Legislative Calendars

The fall recess between Legislative sessions is the best time of year to invite State and Congressional policymakers to participate, since they are more likely to be working in their districts during weekdays and on the weekends.

Panelist invitations

Invite panelists/policymakers as soon as possible to confirm their interest and willingness to participate, and to identify potential scheduling conflicts.

Initial invitations can be made in person or over the phone, ideally by a colleague or acquaintance of a particular policymaker. Consider your network — is someone personally connected with a particular elected or staff member? Cold calling can work too, but you are more likely to get a positive response from a personal phone call or in-person drop by. The higher up the person doing the inviting, the better the outcome. You are less likely to be sent to the general public inbox or leave a message on a general voicemail.



F5 TIP:

Be prepared to discuss event program specifics, including information about the agenda, how the program will be structured, topics to be discussed, others invited to participate on the panel, and the exact role you want them to play.



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Once the initial request is made, follow up with a written invitation letter and formal request for an RSVP. Make sure your letter is clear on the exact role you would like the invited policymaker to play at the town hall. Include with your letter a packet of compelling information about your county commission and/or your partners/co-hosts in case the invited policymaker is not familiar with First 5.

The Toolkit includes Templates and Samples to help you with policymaker/panelist invitations. See available tools in this section for more information.

CHECK IT OUT!

Direct lobbying vs. policy education: Understand the boundaries

Proposition 10 allows for making direct recommendations to the state legislature for changes in state laws, regulations, and services, should your Commission be interested in using your town hall event as an opportunity to make recommendations on specific legislation and/or budget policies. We would caution that this allowance does not necessarily extend to issues before the public for a vote.

With that said, each county commission has their own policies around direct engagement vs. policy education, so be sure to check with your legal counsel about any specific parameters. Whether or not your commission chooses to engage in lobbying, everyone can engage in policy education. And anyone can host a very successful town hall meeting solely for the purpose of educating your elected officials and the public on critical issues – rather than advocating for specific bills or policy changes.

EXPERT PRESENTERS: Highlighting the issues and work of First 5 and partners

The town hall also provides an opportunity for county commissions to highlight the local issues that impact young children and the work of First 5 and your community partners. One of the primary ways to do this in a town hall setting is through brief, engaging issue/program presentations by one or several experts.





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Inviting the presenters

This depends upon the issues being discussed. In general, presenters will include practitioners and subject-matter experts from critical stakeholder or grantee-partner organizations. Here are some things to consider when selecting presenters:

- 🖐️ Presenters should be extremely familiar with the issues and possess a unique and important perspective that will aid in the discussion of the problem, its local impacts, and possible solutions. Look for presenters who are knowledgeable and also skilled at engaging an audience.
- 🖐️ Presenters also could include those who have been impacted by the issues. For example, parents or teachers can share stories about the impact of quality early learning in their experience and how it relates to the larger policy goals of the event.
- 🖐️ Think about assembling speakers who reflect the full diversity of culture, experience, and perspective in your community.

Include a maximum of three presenters (each with five minutes to speak on their issue area). Alternatives include having two presenters (each with 6 to 7 minutes to speak) or one presenter and one to two case studies (i.e., an expert presenter to address family strengthening and a mother to share her story about home visiting). The goal is to make the presentations more than a “report out” by one presenter and, instead, to tell a compelling story about the issues and lives of young children in your community.

Presentation content

Presentations should provide an overview of each town hall issue in a way that tells a compelling story, including impactful statistics, and, when possible, showcases examples of direct impacts on local families’ lives. The challenge is to provide this contextual information within the recommended 15-minute timeframe for presentations included in our sample agenda, for a 90-minute event.

See the “Event Structure” section for a Sample Internal Agenda.

🖐️ F5 TIP:

Highlight new information

Look for **new** or **newsworthy** information, data, or case study to present at the town hall, such as any new studies or reports that can provide a “hook” for encouraging audience and media attendance.

Avoid “getting into the weeds”

Ask your presenters to focus on outlining the most compelling statistics and high level points, and offer additional information, facts and figures, etc., in a handout. High-level presentations help keep your audience’s attention during a short timeframe!

Make it personal

Whenever possible, make presentations more personal by showing the faces of First 5 in your community — the grantee partners, community organizations, and the children and families who are impacted by First 5. Real beneficiaries are your best advocates!

Sign off on everything!

Make sure to vet all presentations and handouts well ahead of the event!



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MODERATOR: A positive force and event guide

Your moderator will serve as the perceived event host by your audience, and will be important in setting a positive atmosphere so that panelists feel comfortable sharing their thoughts and perspectives, and guests feel welcomed to ask questions that are important to them.

Look for a moderator who understands the importance of First 5 issues and why the audience should feel engaged to participate. Make sure the moderator is skilled at keeping the conversation going — inserting prepared questions, interjecting follow-up questions, and making bridges between ideas.

See “First 5 Policy Tools” section for more information and Sample Panelist Questions.

Potential moderators could include:

- 👉 An influential business or community leader
- 👉 A local television or radio host, or early education/community interest reporter
- 👉 A respected local elected official or high-ranking local government position-holder, such as a Public Health Officer, former Mayor or County Superintendent
- 👉 A well-known, long-standing service provider, such as a First 5 Executive Director or a First 5 commissioner

Securing a commitment: Engaging participants and guests to take the pledge

One of the town hall’s key goals is to compel — first and foremost — policymakers, other participants, and guests to commit to improving the lives of children 0 to 5 at this year’s town hall event and in the future. And one of the most important moments of your town hall will take place near the end of the event as the moderator summarizes the issues and next steps, and asks both policymakers and guests to make a pledge to take action.

See Sample Internal Agenda in the “Event Structure” section.





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Getting a tangible (even if symbolic) commitment is an important measure of success for your town hall. After all, educating participants and guest about the issues is an important step, but getting them to take action is the ultimate desired outcome. How you compel that commitment is completely up to you.

For example:

- ✎ Have the moderator or First 5 county commissioner ask policymakers and guests to sign the First 5 Pledge. First 5 Pledge Card Templates in this section are available for you to customize and use to capture commitments in writing.
- ✎ Have the moderator ask panelists targeted questions about their commitment to a particular issue to gain a verbal commitment.
- ✎ Have the moderator also can ask all participants and guests to make a more general commitment to improving the lives of young children and families in their community.

GUESTS: Involving individuals and groups that care about the issues

Brainstorm statewide and local organizations, groups, individuals, and grantee partners who are interested and/or involved in your town hall issues and invite them to attend as guests. To aid in the brainstorming process, see our Sample Partner/Guest List in this section for a list of suggested guests to invite and ask to spread the word to their networks.

See “Planning” section for information about finding partners who could provide additional staffing, expertise, and resources to make your event a success. Those organizations also could be invited as guests.

F5 TIP:

Prep policymakers about the First 5 Pledge

It is vitally important you talk with participating policymakers in advance of the town hall about the First 5 Pledge — what it means to the event and what you will be asking them to do. Provide a copy of the First 5 Pledge Card (for policymakers) should you choose to use it. After all, we want policymakers to come away with a positive experience — and to participate again at next year’s town hall or other event. You don’t want them to be caught off guard, especially in a public setting.





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Tools Available in the “Participants” Section:

- ✓ **Panelist Prep Packet** for you to customize and give to policymakers as soon as possible after their participation is confirmed
- ✓ **Policymaker Invitation Letter Template** for you to customize and send to invite your policymakers
- ✓ **Sample Partner/Guest List** of suggested list of organizations to consider inviting as your event guests and/or partners/co-hosts

You can use these templates exactly as outlined, adapt them, or create new materials to meet your needs.

See the “Planning” section for a Planning Timeline, and more information about finding partners to make your event a success.

F5 TIP:

Combine your panelist prep session with a site visit

Hold your panelist prep session at a case study location you plan to highlight during the town hall. This will make the issues real and the preparation more meaningful, not to mention that policymakers can mention during the town hall they saw the program first hand.

